South Dakota Department of Public Safety

E.D.G.A.R (Electronic Database for Grant Application & Reporting)

Highway Safety

Grantee User Manual

VERSION 1.0

Table of Contents

System Requirements

E.D.G.A.R. was designed so that the vast majority of computer users will be able to use the system with little or no changes to their computer environment. The four requirements that are mentioned below are common computer elements that should be already present on most computers / systems.

Operating System

E.D.G.A.R was designed for both of the two most common computer operating systems: Windows and Macintosh. It has not been tested nor is it supported on other operating systems, such as Linux or Unix. Users accessing the system from a Macintosh environment are required to have MacOS 7.5 or higher, running on a PowerPC processor. Windows users are required to have an operating system that is Windows 95 or higher.

World Wide Web Connection

E.D.G.A.R is an Internet application. It is accessed via the Internet and was specifically designed for Internet usage. The Internet is the more general term that is typically used to refer to the World Wide Web. The World Wide Web consists of a vast array of content that is accessible via a web browser. For the purpose of accessing E.D.G.A.R, the standard Internet connection is via a modem connection. A modem is a piece of hardware that connects to the computer to send data through a phone line to and from the computer. Internet connections that are "faster" than a modem connection, such as cable and DSL, will improve the speed at which the system operates, but are not necessary in order to use the system. If you are in an office environment, you may already have an Internet connection, but if you are unsure, please contact your organization's network administrator.

For those using a dial-up connection over a modem, it is highly recommended that you have a modem connection speed of at least 33.6 kbps (kilobits per second).
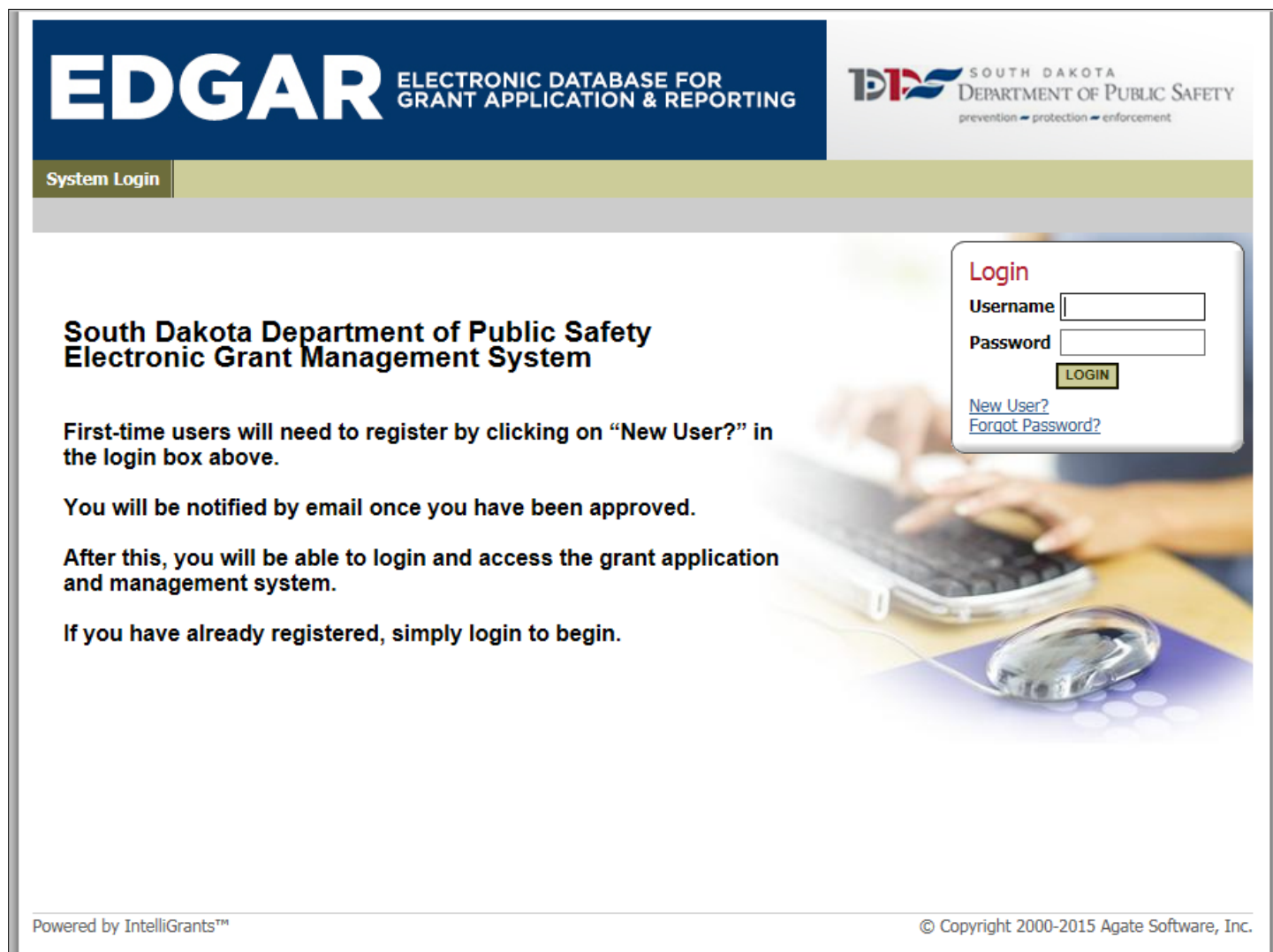
Web Browser

This system was designed to be compatible with common up-to-date web browsers including Internet Explorer, Firefox, Safari, and Opera.

Adobe Acrobat Reader

Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. The system will automatically generate grant documents in PDF format using information that has been saved into the various narrative and budget pages. Using Adobe Acrobat Reader you may choose to view, print, or save these documents. If you do not have Adobe Acrobat Reader you can go to www.Adobe.com and download it free.

E.D.G.A.R. System Homepage

To access E.D.G.A.R., type https://sddps.intelligrants.com into the address bar of your web browser and press Enter. The web browser will direct you to the following web page.

Applicant User Types

There are four security roles defined for E.D.G.A.R. grantee users: Authorized Official, Authorized Signer, Financial Officer, and Viewer. Each role consists of a separate level of access within the system, which are defined below.

Authorized Official

A user with the Authorized Official role will be capable of the following:

- The initiation of an application
- The viewing of an application
- The completion of application forms
- The assigning of other users

Authorized Signer

A user with the Authorized Signer role will be capable of the following:

- The initiation of an application
- The viewing of an application
- The completion of application forms
- The assigning of other users
- The submitting of an application
- The cancellation of an application

Financial Officer

A user with the Financial Officer role will be capable of the following:

- The viewing of an application

Viewer

A user with the Viewer role will be capable of the following:

- The viewing of an application

Grantee Security Role Matrix

Below is a summarized table of the details listed above.

| Grant Security Role	Initiate Application	View Application	Assign Users to Application	Complete Application	Submit Application	Cancel Application
Authorized Official	X	X	X	X		
Authorized Signer	X	X	X	X	X	X
Financial Officer		X				
Viewer		X				

Gain Access to E.D.G.A.R.

In order to gain access to E.D.G.A.R. you must have been granted access by another user. If you are the first user of your organization to enter the site, you must request access from a System Administrator. Otherwise, you must contact the individual of your organization that currently has a user account with the Authorized Official role.

Gain Access as an Authorized Official

In order to gain access as an Authorized Official, you must request access from a System Administrator. To do so, you may follow these steps:

1. While viewing the E.D.G.A.R. System Homepage, click on the "New User?" hyperlink. This can be found within the Login control.

2. This will direct you to the Registration page. Here, you are able to complete a series of fields. All fields that are marked with a red asterisk indicate that it is a required field, and must be complete before the Registration page can be saved.

3. Some fields require other business rules, as follows:
    a. The Username field must only consist of letters and numbers, and must be between 5 and 20 characters.
    b. The Password field must only consist of letters and numbers, and must be between 7 and 20 characters.
    c. The Confirm Password field must consist of the exact data entered into the Password field.

4. Furthermore, while selecting the division that you are applying for, you must select "Office of Highway Safety".

5. Once you have entered data into all of the required fields, click the **SAVE** button, located at the top right corner of the page. If the page is without errors, there will be an information box at the top of the page, indicating that you have successfully completed the Registration page, and in turn, successfully requested access to the system.
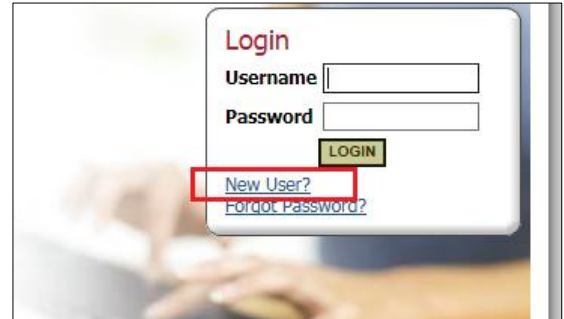
NOTE:

Passwords expire annually.

You will be notified once the System Administrator has granted you access into the system. You will not be able to login until you have been granted access.

Please do NOT submit multiple requests.

Granting Access to an Authorized Signer, Financial Officer, or Viewer

In order to gain access as an Authorized Signer, Financial Officer or Viewer, the Authorized Official for your organization must grant you access.

If you are the Authorized Official of an organization and you wish to grant access to additional users, you may do so by following these steps:

1) From the My Home page, click on the My Organization(s) hyperlink that is located in the navigation bar at the top of the page. This will bring you to the Organization page.

   (If you are a member of multiple organizations, it will bring you to a table of all the organizations you are currently a member of. Simply click on the organization name in which you wish to add members.)

2) From the Organization page, click on the Organization Members hyperlink.

3) The Organization Members page will list all of the users that are associated with the organization. To add a new member, click on the Add Members hyperlink. This will bring you to the Add Members page. From here, click on the NEW MEMBER button.

4) Complete all of the required fields and click the **SAVE & ADD TO ORGANIZATION** button at the top right corner of the page. This will notify the new user that they have been granted access to the system.

My Home

Once you have successfully gained access to the system, you will be directed to the My Home page. The My Home page is the home page for E.D.G.A.R. users. From here, you can navigate to the rest of the system.

Below, you will find reference to each navigation hyperlink or section:

My Home

This is a navigation hyperlink that will return you to the My Home page, from anywhere in the system.

My Applications

This is a navigation hyperlink that will direct you to the My Applications search page. This page can be utilized to return to initiated applications for your organization(s). You can access this hyperlink from anywhere in the system.

My Progress Reports

This is a navigation hyperlink that will direct you to the My Progress Reports search page. This page can be utilized to return to initiated progress reports for your organization(s). You can access this hyperlink from anywhere in the system.

My Reimbursement Requests

This is a navigation hyperlink that will direct you to the My Reimbursement Requests search page. This page can be utilized to return to initiated reimbursement requests for your organization(s). You can access this hyperlink from anywhere in the system.

My Organization(s)

This is a navigation hyperlink that will direct you to the Organization page. This page can be utilized to update organization information, add / remove / deactivate organization members, and to view / return to organization documents. Organization documents will display a list of initiated applications, initiated progress reports, and initiated reimbursement requests for your organization. If you are a member of multiple organizations, you will have the opportunity to select a singular organization to view. You can access this hyperlink from anywhere in the system.

My Profile

This is a navigation hyperlink that will direct you to your user profile. This page can be utilized to update your profile information and to change your password.

Logout

This is a navigation link that will log you out of the system, and direct you to a logout confirmation page.

SHOW HELP Button

Clicking on this button will expand the Page Help panel that will offer help information in regards to E.D.G.A.R. and help desk. Here you can find the Help Desk Availability and contact information.

Welcome Panel

The Welcome Panel will display your chosen picture, a welcome greeting which includes your first name, and your current system role. You may also utilize the Change My Picture hyperlink to choose a different picture than the one that currently displays in the Welcome Panel.

Instructions

As like many locations within E.D.G.A.R. this page has an Instructions section. These sections are here to direct you to your current task in mind.

View Available Opportunities

View Available Opportunities is the first of three major functionalities that can be found on the home page. The section on the home page will offer you a summarized amount of available opportunities, as well as, a button to view these available opportunities. Clicking this button will direct you to the My Opportunities page.

For each available opportunity, the My Opportunities page will display a new section. Within each section you can find the following:

Application for Organization

Firstly, the name of the application, along with the associated fiscal year will display. It will also display for which organization this opportunity has been made available.

Offered By

This displays the Organization or Agency whom is offering this opportunity.

Application Availability Dates

This displays the date range of when this opportunity will be available to initiate.

Application Period

This displays the total date range that this opportunity will be active.

Application Due Date

This displays the date by which a successfully completed application must be submitted.

Description

This provides a finer description to what this opportunity is, and who should apply. If a description is included, this will provide a finer description to what this opportunity is.

Apply Now Button

Clicking this button will initiate the opportunity.

My Inbox

The My Inbox section of the My Home page is where you can find all of the notifications sent to you. From here you can read messages that are sent to you, as well as, compose new messages to send out. At first glance, the My Inbox section will display the amount of new messages that are currently in your inbox. To expand the My Inbox section, click the **OPEN MY INBOX** button. For further system message functionality, navigate to the My System Messages page by clicking the View All My System Messages hyperlink.

My Tasks

The My Tasks section of the My Home page is where you can find all of the tasks / actions that require your attention. Whether you may need to complete and submit an application, or deliver a progress report, My Tasks will direct you to the location in order to do so. At first glance, the My Tasks section will display the amount of new tasks and the amount of task that are critical. To expand the My Tasks section, click the **OPEN MY TASKS** button. To continue working on a task, click on the hyperlink found in the Name column of the task.

Keeping Contact Information Current

In order to receive continued funding or to enter into new grant agreements, it is important that your contact information be as up-to-date as possible. This is done very quickly and easily in E.D.G.A.R. By keeping your user record and agency record current with all of the latest changes, E.D.G.A.R staff will be able to contact you appropriately when the need arises.

Updating Your User Record

You may update the information in your user record at any time by following these steps:

1)   Click on the My Profile hyperlink located in the navigation bar at the top of the page. This will direct you to the My Profile page where you can update the information in your user record, as well as, changing your password.

2)   Update all information as necessary, and once complete, click the **SAVE** button.

Updating the Information for Your Organization

You may update the information for your organization at any time by following these steps:

1) Click on the My Organization(s) hyperlink located in the navigation bar at the top of the page. This will direct you to the Organization page, where you can update the information for your organization. If you are a member of multiple organizations, you will have the opportunity to select the organization that you wish to update.

2) You will see the short name selected below, once you have access to edit your organization information you will need to change this. This will be used to identify your application name, so be sure to use a short name, acronym, or abbreviation that will allow your application to be easily identified as your organization. Ex: "Grantee User Manual" is the organization name, "GUM" would be an appropriate short name.

3) Update all information as necessary, and once complete, click the **SAVE** button.

Deactivating a User in the Organization

There may be reason to deactivate a user from your organization. This can be accomplished by following these steps:

1) From the Organization page, click on the Organization Members hyperlink. This will direct you to the Organization Members page. Here, you will have the ability to see all of the Current Members.

2) Scroll to the row position where the target user is located. Within this row position, in the Active Dates column, place the date of when you would like this user to be deactivated from this organization, in the second date field of the column. Click the **SAVE** button.

NOTE: *Alternatively, if the target user does not have any Active Documents, then the user can be completely removed from the organization, rather than deactivated. This can be accomplished by unchecking the box next to their name, and clicking the* **SAVE** *button.*

Initiate an Application

The Authorized Official is permitted to initiate applications, and may do so by following these steps:

1) From the My Home page, in the View Available Opportunities section, click the **VIEW OPPORTUNITIES** button. This will direct you to the My Opportunities page. Here you will see all of the opportunities for which you may apply.

2) To initiate an application, click the **APPLY NOW** button for the application you wish to complete.

3) This will direct you to the Agreement page, where it will ask you for confirmation. After reading through the displaying questions or agreement language, click the **I AGREE** button to continue to the application.

*NOTE: If the terms are not agreeable, or if you have navigated to this screen in mistake, you can click the **I DO NOT AGREE** button to cancel the current actions and return to the My Home page.*

4) Once you have accepted the agreement, you will be directed to the Application Menu, where you may continue to complete your application.

Returning to an Initiated Application

Following the initiation of an application, a new task for that application will be available in the My Tasks section of the My Home page. If a situation is to occur where you have to leave the application, you may return to it using the My Tasks section. You may do so by following these steps:

1) From the My Home page, expand the My Tasks section by clicking the **OPEN MY TASKS** button.

2) Here you will see a list of your current tasks. You may return to the Application Menu page of the task by clicking on the hyperlink that is available in the Name column.

Returning to a Completed Application

Once an application no longer requires your attention, it will no longer be available in the My Tasks section. To return to an application for viewing purposes, you can utilize the My Applications search page. You may do so by following these steps:

1) From the My Home page, click on the My Applications hyperlink located in the navigation bar at the top of the page.
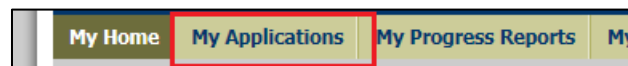
2) Use the fields available to enter in information that will filter search results, and then click the **SEARCH** button. This will display a list of applications that you have access to view. You may return to the Application Menu page of the application by clicking on the hyperlink that is available in the Name column.

The Application Menu

The Application Menu page is the main page for the application. From here, you have the ability to navigate to all of the tasks and actions required to complete the application.

Document Information

This provides a hyperlink that will return you to the current screen, from anywhere within the application.

Details

This is an expandable section that, once expanded, will display current information about the user and the application, such as the document type, the applicant organization, the current user role, the current status, and the fiscal year.

View, Edit and Complete Forms

From the Application Menu page, click on the **VIEW FORMS** button. This will direct you to the Forms page.

Status

This will display a different icon based on the status of the form. When the page has not been completed, there will be a blank page as the icon. When the page has been successfully completed, the will be a page with an overlaying pencil as the icon. When the page has been unsuccessfully completed, and there are currently errors on the page, there will be a red octagon housing the image of a hand showing the palm, as the icon.

Page Name

This is a hyperlink that will display the name of the form / hyperlink / PDF Download. Click on this hyperlink to be directed towards the task, action, or data collection form.

Note

This will display an Icon that indicates that a user has left a note on the form.

Created By

This will display the user that created this form, along with the date and time that this action occurred.

Modified By

This will display the last user that has modified this form, along with the date and time that this action occurred.

Successfully Completing a Form

After navigating to a data collection form, you are expected to successfully complete the form. You may do this by entering all of the data that being asked of on the form, and clicking the **SAVE** button. After clicking the save button, form will either display the Page Information notification indicating a successful save, or a Page Error(s) notification. Continue entering data and saving the page until you receive the Page Information notification.

Repeatable Rows

In some locations, rows will continue to repeat, allow you to enter in additional information as needed. First you will need to fill in the available row(s) and click the **SAVE** button.

4	Equipment	$1.00	$1.00	$2.00	$1.00	2	$2.00
	Equipment	$1.00	$1.00	$2.00	$1.00	2	$2.00
	Equipment	$1.00	$1.00	$2.00	$1.00	2	

After you have saved the page, additional rows will become available. This process can be repeated by filling in the available rows, and clicking the **SAVE** button.

4	Equipment	$1.00	$1.00	$2.00	$1.00	2	$2.00
	Equipment	$1.00	$1.00	$2.00	$1.00	2	$2.00
	Equipment	$1.00	$1.00	$2.00	$1.00	2	$2.00
	Equipment						

Situational Business Rules

In some locations, a field may or may not be required based on other information entered into the application. For example, there may be a yes or no question, and if yes is answered, the form may require that you provide information explaining the answer. Be sure to follow the instruction provided in the Page Error message associated with the business rule.

Uploads & Attachments

Upload fields can be utilized to upload / attach files to forms, where available. To utilize this field, click the **Browse…** button, and select the desired file that you wish to upload, and then click **Open**. This will bring the file name into the field.

Only files of the following types are allowed: doc, eps, pdf, jpg, gif, bmp, txt, avi, wmv, ppt, xls, mov, dpi, png, and mp3

When combined with Repeatable Rows, you may have the ability to upload additional attachments. You may do this by selecting files for each available upload field, and then clicking the **SAVE** button. After saving the page, additional upload fields will become available.

Copy & Paste Disclosure

Applicants should be cautious while utilizing the copy and paste function of most word processing programs to transfer text into narrative boxes within E.D.G.A.R., as it will not recognize certain formatting, including tables, graphs, photographs, bullets, and certain tabs. Applicants must also be aware of the character limits of each text box, as attempting to copy and paste text that is larger than the allotted amount of space will yield an error. The character limit

may be found at the bottom left of each text box. Applicants may want to first copy and paste text into any standard "notepad" (or equivalent) program, which will have similar formatting to the text boxes in E.D.G.A.R.

Adding and Editing Notes

To encourage communication within the system, users will have the ability to add Notes to a form. You may do so by following these steps:

1) Click the **ADD NOTE** button that is located at the top right corner of the page. This will open the Notes panel. This panel has the ability to be moved to any location on the screen.

2) To add a new note, click on the **ADD A NEW NOTE** button. This will open the Add New Note panel.
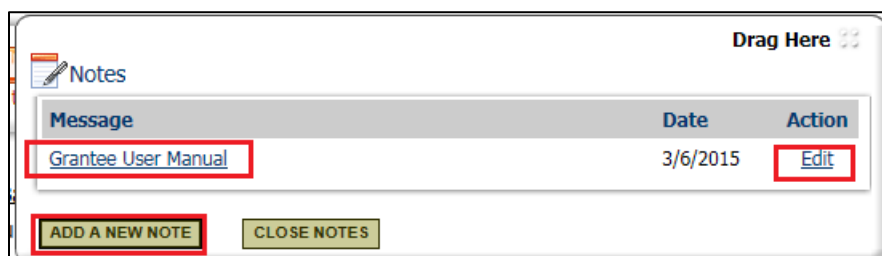
3) Enter a Subject and a Message, and then check the box next to the name of the users you would like to view this note. You may also check the All / None checkbox to either check everyone, or no one.

4) You can view notes by clicking on the hyperlink provided in the Message column.

5) You can edit notes by clicking on the hyperlink provided in the Action column.

Printing the Form

Some data collection forms my offer a PDF version of the data you have entered into the form. You can utilize these PDF versions to print the form, or to save for future reference. To download a PDF version of the form, click the **PRINT VERSION** button that is located at the top right corner of the page.
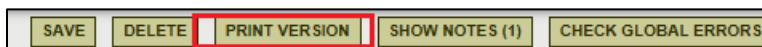
It is a good practice to review the PDF versions for accuracy prior to submitting the application electronically.

Change the Status

From the Application Menu page, click the **VIEW STATUS OPTIONS** button. This will direct you to the Status Options page. Here, you will have the ability change the status of the application. To change the status of the application, click the **APPLY STATUS** button located underneath the status you wish to apply to this application.

Access Management Tools

From the Application Menu page, click the **VIEW MANAGEMENT TOOLS** button. This will direct you to the Management Tools page. Here, you will see a list of tools that are available to you.
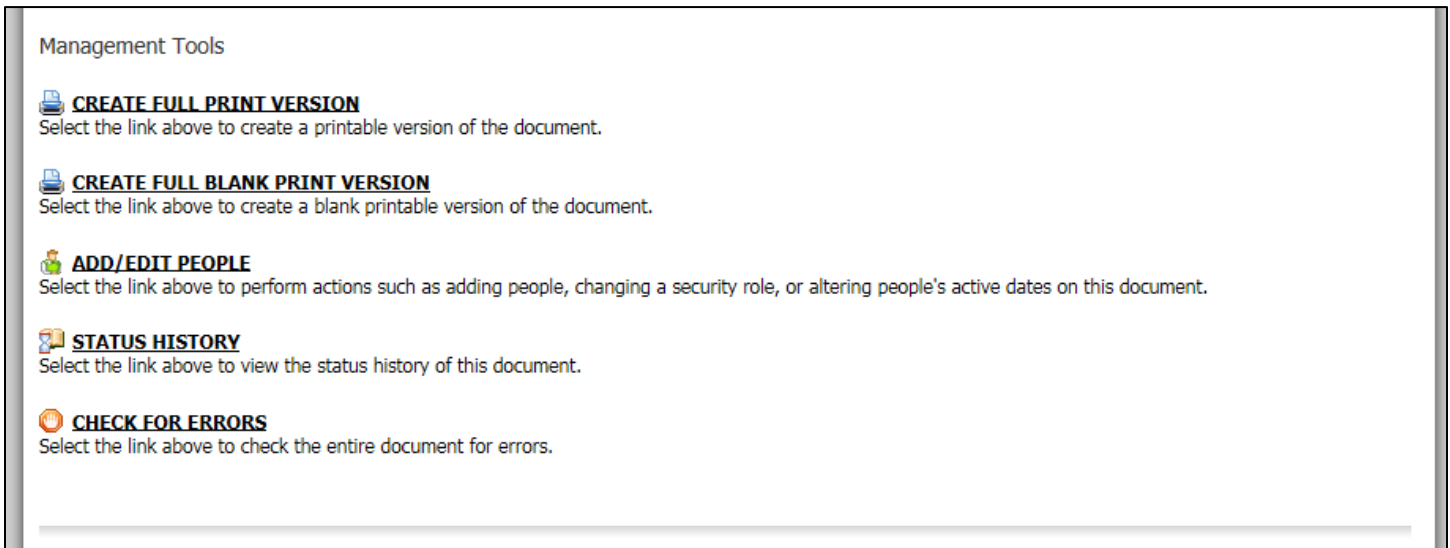
CREATE FULL PRINT VERSION

This tool will allow you to download a PDF version of the entire application, and all of the data that has been entered.

CREATE FULL BLANK PRINT VERSION

This tool will allow you to download an empty PDF version of the entire application.

ADD / EDIT PEOPLE

This tool will allow you to add users to this application, as well as many other editing tasks.

STATUS HISTORY

This tool will allow you to view a history of all of the status changes that this application has undergone.

CHECK FOR ERRORS

This tool will direct you to the Global Errors page, which will display all of the current errors in the application.

Examine Related Items

From the Application Menu page, click the **VIEW RELATED ITEMS** button. This will direct you to the Related Items page. Here, you will be able to view related documents, as well as related messages.

From within the Related Documents Section, you will be able to initiate progress reports and reimbursement requests that are associated with this application, once they become available.

Assigning Users to an Application

The Authorized Official has administrative rights to add or remove users from the application. This ability will be especially useful in the event that an application was initiated prior to the user gaining access to the system.

Granting User Access

Granting a user access to the application may be accomplished by following these steps:

1) From the Application Menu page, click the **VIEW MANAGEMENT TOOLS** button to navigate to the Management Tools page. From there, click on the **ADD / EDIT PEOPLE** management tool hyperlink. This will direct you to the People page.

2) In the Person Search section, enter the user's name, and then click the **SEARCH** button. This will bring up the People Found section. To add a person, click on the check box next to their name, select their role, and click the **SAVE** button. This will grant that user access to the application.

Revoking User Access

To revoke user access, within the Current People Assigned section, either deselect the check box, or enter an end date in the Active Dates column for that user, and then click the **SAVE** button.
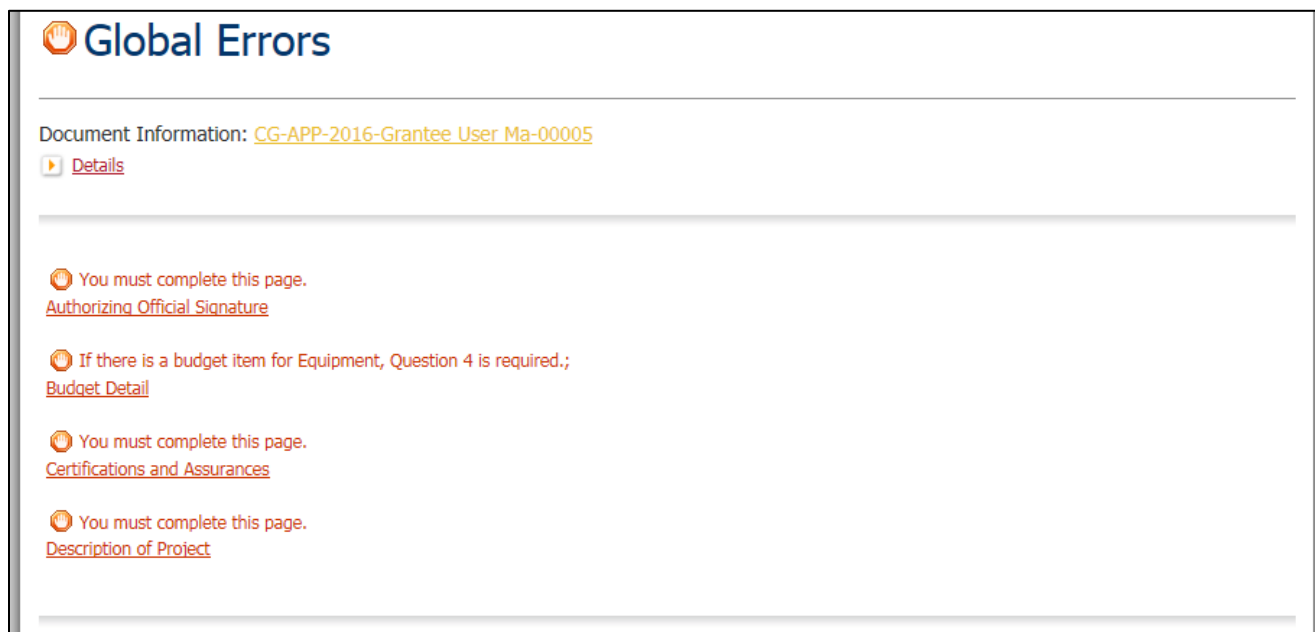
Submitting Your Application

The Authorized Signer is the only role authorized to submit your application. When the application is believed to be complete and no more changes are required, then the Authorized Signer may choose to submit.

<div style="background-color:red; color:white; text-align:center; font-weight:bold;">It is important to note that once an application is submitted it will enter into a read-only status and cannot be changed!</div>

To submit the application, the Authorized Signer must navigate to the Status Options page by clicking the **VIEW STATUS OPTIONS** button located on the Application Menu page. From here, the Authorized Signer will have the ability to click the **APPLY STATUS** button that is located directly beneath the **APPLICATION SUBMITTED** status.

If there are remaining errors within the application, the Authorized Signer will be directed to the Global Errors page. Here, it will list all of the remaining items that must be completed / corrected prior to the submittal of the application. This list will provide hyperlinks that will allow the Authorized Signer to return to the location of the error.
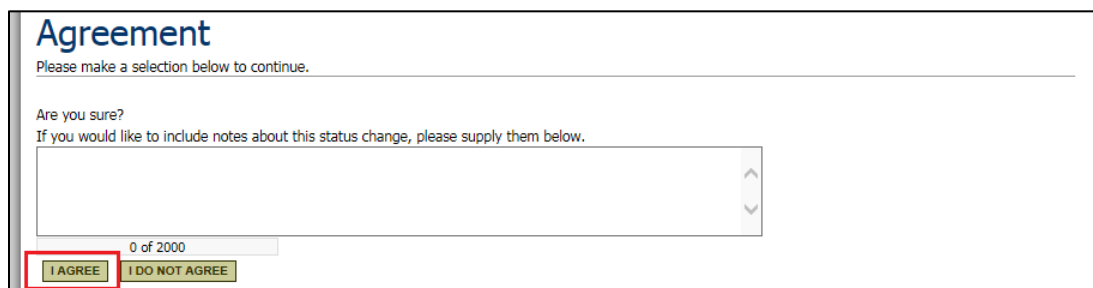

Once all remaining errors within the application have been completed / corrected, the Authorized Signer will need to return to the Status Options page, and undergo the process outlined above. If there are no errors, the Authorized Signer will be directed to the Agreement page, where they will be prompted to read and agree to the agreement language. To successfully submit the application, the Authorized Signer must agree to the agreement language by clicking the **I AGREE** button. Once the Authorized Signer has successfully submitted the application, they will be directed back to the Application Menu. No additional task will be required at this time.